PeopleSoft

# PeopleSoft Enterprise Release Notes for SCM Supplier Relationship Management 8.9 Bundle 7

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## Open Source Disclosure

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# PeopleSoft Enterprise Release Notes for SCM Supplier Relationship Management 8.9 Bundle 7

These release notes reflect application updates for PeopleSoft Enterprise Supplier Relationship Management (SRM) products since the SCM 8.9 Bundle 6. This document includes resolutions for the following Supplier Relationship Management applications:

- PeopleSoft Enterprise eProcurement.
- PeopleSoft Enterprise Purchasing.
- PeopleSoft Enterprise Services Procurement.
- PeopleSoft Enterprise Strategic Sourcing.
- PeopleSoft Enterprise Supplier Contract Management.

## PeopleSoft Enterprise eProcurement

This table summarizes application updates for PeopleSoft Enterprise eProcurement since the SCM 8.9 Bundle 6.

| Functional Categories | Description |
|---|---|
| Catalog Search | Corrected Verity catalog search error message "Invalid transaction search fields registered for Verity search" from displaying when entering price range criteria. |
| Direct Connect / Integration Broker | Modified to ensure that direct connect items are saved as favorites behave in the same manner as direct connect items saved as templates. |
| Manage Approvals | Corrected ePro workflow approval reassignment to allow a worklist entry to be created for the reassigned approver. |
| Manage Purchase Orders | Changed to display the correct buyer for each of the POs retrieved from the Manage Purchase Order page. |
| Performance | Improved performance on the Manage Requisition page by preventing an unnecessary database access from executing. |
| Receiving | Enhanced the Inquiry Receipt page to properly display the tag number and serial information previously entered and the correct title message on the Asset Information page. |
| Requisition Attachments | Corrected the Manage Purchase Order page to display the ePro attachment data. |
| Requisition Cancel/Reopen | • Updated the Manage Requisition page to not display the VAT amount when the requisition items are cancelled.<br>• Ensured the "Distributed by" functionality at the schedule level behaves properly on requisitions when the requisition’s status changes from Open, |

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| | Cancel or Re-open. |
| Requisition Defaults | • Enhanced the Requisition Header defaults on splitting distributions:<br>  • When the Modify Shipping/Accounting page has only one distribution line pressing Apply/OK will display the three radio button options in a new secondary page titled "Distribution Change Options".<br>  • When two or more distribution lines are present, pressing Apply/OK will display the two radio button options. |
| Requisition Manager | Modified the Manage Requisition page to display requisitions created from all sources except core requisitions. |
| Search Settings | Enhanced the verity catalog search settings so that the search parameters set on the System Search Settings page can be defaulted to the search field settings of all users. |
| Usability | Removed the references to non-existent objects to prevent Peoplecode compiles errors. |
| Verity Search | • Improved the verity thesaurus functionality by adding the "Create a New Thesaurus" option on the Build Thesaurus page.<br>• Modified to allow the regular Verity search to complete without displaying the error message "The Verity thesaurus file has not been built"" even though the thesaurus file has not been built. |
| Workflow | • Improved the workflow email notification so that a sender email id specified on the Workflow Notification Template page will be used as the sender of a generated email.<br>• Improved the change request workflow approval process to notify the supervisor of the requestor instead of the creator of the requisition for approval.<br>• Corrected the Approval Process Definition page to not display the level drop-down box for ePro change request amount approvals. |

# PeopleSoft Enterprise Purchasing

This table summarizes application updates for PeopleSoft Enterprise Purchasing since the SCM 8.9 Bundle 6.

| Functional Categories | Descriptions |
|---|---|
| Contracts | • Ensured that the contract item description loads multi-language information.<br>• Modified the contract link to be enabled when clicked from the item vendor contract link.<br>• Ensured that the PO contracts use the PO defaults via override for freight terms.<br>• Ensured that when price adjustments for a contract line are added and the 'View All' function is pressed, that all the details for the Price Adjustment are displayed.<br>• Corrected the Contract Activity report to run to a successful completion.<br>• Changed the PO-Contract to work in the same manner as the PO in regard to comment handling. |
| Messages | Updated the Contract Threshold Notification process to generate a wordlist when an amount criterion is met even if a wordlist already exist. |
| Performance | Improve performance of the Automatic Purchasing Sourcing program by introducing a temporary record to capture the relevant requisition comments. |
| PO Batch | • Changed to pass the standard unit of measure quantity for the item from the Purchase Order Create program to the Inventory Pegging Update program.<br>• Ensured that EDI PO Acknowledgement inbound messages are updating the respective PO acknowledge status as "Supplier Responded" when there are changes in the messaging data.<br>• Changed to leave all the eligible lines untouched for requisitions with multiple lines in complete status and a PO that is still in dispatched status.<br>• Ensured that a PO is dispatched properly via email with printed copy.<br>• Ensured that subsequent schedules from a multi-schedule requisition are allowed to source to PO's when one of the schedules is already sourced to PO and the schedules are set to distribute by amount.<br>• Ensured that the ASN's EIP control id is generated without causing an infinite loop in the ASN transaction process.<br>• Changed to correctly displayed information on the PO Direct Ship Detail page when an overwrite occurs on the order and the PO was sourced by that order.<br>• Modified to allow a PO to be successfully saved when it is created from |

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| | an eProcurement requisition which has an attachment on it's line comment.<br>• Changed to prevent pending canceled PO's from being closed from the reconciliation workbench.<br>• Resolved the issue of scroll buttons missing on the Processing Results page of the PO reconciliation workbench.<br>• Changed to use the appropriate setid field for the category look up prompt in the PO Auto Sourcing component.<br>• Updated the PO Calculations process to avoid errors when sourced for Service Procurement.<br>• Modified to prevent a PO with a negative amount from being qualified for closure by the Reconciliation Workbench and the Close process.<br>• Resolved problem with the Load Statement process when it is auto reconciling a PO to a Procurement Card transaction, it places the matched PO on the Reconcile Statement - Purchase Details (CC_RECON_PO) page. |
| PO Online | • Modified to correctly display the PO status when the On Hold for Further processing option is select on the PO page.<br>• Ensured that when entering a PO, defining a value for the PO due date on the PO Defaults page correctly populates not only the line and schedule due date but the original promise date field.<br>• Modified to correctly populate the buyer id when using the vendor search hyperlink.<br>• Modified to not change the tax applicability if nothing is changed on the Header Details page.<br>• Ensured that the amount only PO distributions defaults are set to distribute by amount and liquidate by amount when the distribute by quantity is enabled and the default liquidation method is quantity.<br>• Modified to not display any comments by default when adding a new line to a PO.<br>• Changed to correctly calculate the tax amount in a PO for all the lines when chunking is enabled.<br>• Modified the PO status to be correctly set based on the automatic approval setup.<br>• Changed to ensure the allocation of distribution happens correctly for a Rolled PO that has a completed row.<br>• Changed the PO lookup for the category to not include inactive entries.<br>• Added a user prompt when copying from a PO that is pending to be canceled.<br>• Ensured that the requisition open quantity is updated correctly and maintains the correct requisition distribution line status:<br>• When a requisition with multiple distributions is copied to a PO |

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| | and the requisition link for the PO distribution is removed and saved.<br>• Removed the requisition link for the PO distribution and the PO distribution line is deleted without saving the PO immediately when a requisition with multiple distributions is copied to a PO.<br>• Corrected to prevent an error from being displayed when selecting a category on the Copy Purchase Order from Requisition on the PO Requisition Selection page.<br>• Ensured that for received PO's, if the received quantity is more than the PO quantity that the expected PO quantity standard is equal to the received standard quantity.<br>• Changed to prevent VAT driver messages from appearing when contact details are changed.<br>• Modified the VAT code label and amount fields to not overlap when printing a PO with a large VAT amount. |
| Procurement Card | • Ensured access rights assignment on the Procurement Card Access Rights page saves correctly when it is changed more than once.<br>• Modified to display the correct message when the employee id field is changed on the Budget Chartfield Validation process run control page.<br>• Resolved issue to correctly mask the card number based on access rights and the unmasked shows the card number properly on both the Visa Details and Master Card Details pages.<br>• Changed drop down boxes to searchable combo boxes for speedcharts.<br>• Ensured that new distributions line will have budget date on the Procurement Card Transaction Detail when selecting a speedchart on the Reconcile Statement - Account Distribution page.<br>• Modified to display an error message for multiple lines selected, view details and split line links. However when only one line is selected it will display the correct page.<br>• Corrected to prevent error from displaying when clicking the look up (magnifying glass icon) button on the PO id field on the Identify Test Data - Lines page for the PO procurement card.<br>• Ensured the procurement card comment keys are initialized properly and no error displays when adding a second comment on the review dispute component on the Line Comments page in the Procurement Card.<br>• Corrected the error "Negative number assigned to an unsigned field" from being displayed when using a speedchart on the Procurement Card Reconcile Statement, Account Distribution page if the speedchart has more than one effective date.<br>• Modified to ensure that calculation of percentages are in correct positive numbers to prevent errors when applying a PO to a credit transaction. |

<table>
<tr><td>Purchasing Product Related</td><td><ul><li>Provided ’Return to Transaction List’ link on the Purchase Order and Requisition Inquiry pages when activated from a Project Costing Transaction List component or page.</li><li>Modified the interface with the Route Routine to have the following behavior:<ul><li>When the ‘Use Route' is checked for the item business unit (IBU) and a route exists where the schedule date is different from the demand schedule date, the route will not be used and the ship via, carrier id, route code and route stop fields will not default from the route on to the demand.</li><li>When the 'Use Route' checked for the item business unit (IBU) and a route exists where the schedule date is same as demand schedule date, the ship via, carrier id, route code, and route stop fields should default from route on to the demand.</li></ul></li><li>Modified the PO Rollover Workbench to not select disqualified POs.</li></ul></td></tr>
<tr><td>Receiving Online</td><td>Changed the Inquiry Receipt page to display previous entered tag number and serial information and the correct title message on the Asset Information page.</td></tr>
<tr><td>Report</td><td><ul><li>Changed to correctly reflect the PO total amount for cancelled lines and schedules on the PO Listing by PO Date, PO Listing By Vendor and PO Listing By Buyer reports.</li><li>Eliminated the printing format errors for line comments and business unit comments from the PO dispatch report.</li><li>Modified the Receipt Delivery Report (POY5030) to print PO header and line comments even if the ‘send to vendor box’ is checked.</li></ul></td></tr>
<tr><td>Requisition Batch</td><td><ul><li>Updated the Load Requisition Process for Ship via defaulting.</li><li>Ensured the user has the ability to close individual lines of a PO from the PO Reconciliation Workbench.</li></ul></td></tr>
<tr><td>Requisition Online</td><td><ul><li>Changed to display a warning message when the distribute by field is changed from quantity to amount on an inventory item while in a requisition.</li><li>Resolved issue so that when a category code is added on requisition defaults, it populates on to the existing adhoc requisition lines. After saving the requisition, the category value will not be blanked out when commitment control is turned on.</li><li>Modified to ensure that the search parameters work properly by avoiding auto-filling the search field with leading zeroes.</li><li>Ensured that no data conflict errors are shown after creating a change order without leaving the requisition header page to create another change order or when coming back to the requisition page after the requisition is saved to create a new change order.</li><li>Ensured that a validation error message will display when a price is entered with a value less than one without entering a zero in front of</li></ul></td></tr>
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| | the decimal point.<br>• Modified to force the user to enter the requestor before allowing requisition line quantity changes. This prevents an error from displaying when the requisition with item information is refreshed or saved without a requestor.<br>• Ensured that the Projects Business Unit (PC BU) value is populated correctly on the Requisition Distribution page when the Requisition Defaults page with Override option is used.<br>• Modified the requisition open quantity to be correctly updated when staged requisition are purged or reset.<br>• Ensured no deletion functionality is available for requisitions when the Business Unit or Requestor are not authorizing for deletions.<br>• Changed to properly align the denied field on the Requisition Reconciliation Workbench page with the other status fields on the Filter Options page. |
| RFQ | Ensured that the requisition line from a multi-line requisition is available in the selection criteria to create a new RFQ when another RFQ is already created using one of the requisition lines after a contract is created from RFQ. |
| Workflow | Modified to prevent the wordlist entries from being created when the maximum amount notification group is not populated |

# PeopleSoft Enterprise Services Procurement

This table summarizes application updates for PeopleSoft Enterprise Services Procurement since the SCM 8.9 Bundle 6.

| Functional Categories | Description |
|---|---|
| Time and Expense | Removed defaulting start and stop times from time template. The start and stop time will no longer default on to the Entry page. Users will need to 'clock in' and 'clock out' to report time for a particular day. |
| Usability | Removed the references to non-existent objects to prevent Peoplecode compiles errors. |
| User Management | Modified the Requester Defaults and Service Coordinator default components to correctly resolve setid issue for service type and services. |

# PeopleSoft Enterprise Strategic Sourcing

This table summarizes application updates for PeopleSoft Enterprise Strategic Sourcing since the SCM 8.9 Bundle 6.

| Functional Categories | Description |
|---|---|
| Event Creation | • Provided error message to user when adding constraints to event header if:<br>  • Constraint Based on = Awarded Quantity.<br>  • Constraint Based on = Bid Factor and Award Constraint = Quantity. |
| Integration - Contracts | Modified program to loop through all the distribution lines for each schedule line. |
| Sourcing Plans | Provided an error message to users if they select the current plan\template when attempting to copy a plan\template in the current plan. |

# PeopleSoft Enterprise Supplier Contract Management

This table summarizes application updates for PeopleSoft Enterprise Supplier Contract Management since the SCM 8.9 Bundle 6.

| Functional Categories | Description |
|---|---|
| Contract Entry | Resolved issue where some of the agreement links and buttons were not active for selection if the user only had display only access to the component. |
| Contract Library | • Resolved error message issue when previewing a clause, section or configurator to ensure that when pressing the preview button the installation setting will use the temporary application server directory and not the TMP variable setting on the application server.<br>• Corrected the validation process when changing the display sequence number (sequence field) within the Question Group definition.<br>• Fixed issue within Rules Definition to correctly update the internal bind cross-reference table for prior effective dated rows. |
| Contract Syndication | Modified the Syndication page within Contract Entry to ensure that a subscribing node can be correctly selected within the syndicate grid for PeopleTools 8.48. |
| Document Management | • Modified to prevent the bypass approval button from showing for users who are not the administrator but have administrative rights to the document.<br>• Resolved issue where the required Documents description field for the base language was not correctly populated when a document was created in a non-base language.<br>• Modified code to ensure that when performing a dispatch or send to contacts that the “from” email account is the user’s (who initiated the dispatch) email account and not the default SMTP account name.<br>• Modified to prevent extraneous logging clause messages from being created when having two identically named configurator id’s within two different setids and a clause exited in one setid and not the other.<br>• Resolved issue where dispatching or sending to the Contacts page results in an error if you tried to add two adhoc email users (rows) to the Send to Contacts grid.<br>• Resolved issue where no history rows were logged for a document when creating a ‘Create Amendment’ of amendment type ‘Amend Contact only’.<br>• Resolved issue in document history where the view links were not working correctly for two amendments file of type “Amend Contract with Amendment Files after regeneration or a refresh was done on only one of the two files.<br>• Resolved issue where some of the Document Management links and buttons were not active if the user had display only access to the component. . |
| Document Search | • Added security check for the view document button to ensure that the user has the correct access to launch the Contract Document. |

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| | • Fixed the prompts for the clause, configurator, contract id, vendor, item, and category field to use the correct setids to determine the correct prompts to display.<br>• Corrected the Configurator Where Used page within the search contents component to display the corresponding setid field to allow the users to search where the configurator is used across documents within multiple setids. |